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# Using the social return on investment framework to evaluate behaviour changes of individuals living with learning difficulties.

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## **Author Biography.**

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## **Abstract.**

A number of scholars have raised concerns that many social marketers fail to consider the cost of their programmes and its related savings. One solution is to use the social return on investment (SROI) framework, which is rooted in the theory of change. To demonstrate its possibilities, a single case study, focusing on a small social enterprise based in the north of England, was used. They apply social marketing principles to influence positive behaviour changes in people living with learning difficulties. The study was limited to their Teens-n-Twenties programme, which was designed to support individuals between the ages of 14 to 25 become more independent. The results demonstrate that the programme had an SROI valued somewhere between 2.36:1 and 3.88:1 (i.e., for every £ invested, a value of between £2.36 and £3.88 was delivered in social worth). This evaluation was used as evidence of the programme's effectiveness in a continuing funding bid, and the organisation was awarded just under £500K from the UK's Big Lottery Fund. The study contributes to the knowledge and practice of social marketing by presenting a possible solution to the domain's concerns on how social marketing can be evaluated.

## **Keywords.**

Social return on investment, SROI, theory of change, social marketing.

## **Introduction**

Lack of accountability and credibility is a common criticism of marketing (Gao, 2010). In social marketing (SM), Lister, Mcvey, French, Stevens, and Merritt (2008, p.59) believe that there is “no clear consensus on how outcomes should be evaluated.” Balch and Sutton (2018) want SM evaluation to be more accountable. They prescribe a practical approach and urge the domain not to focus on meaningless academic questions. Crosier and McVey (2010) raised concerns that many social marketers fail to consider the cost of a programme and its related savings, which can then be used as evidence for continued funding. This issue should not be underestimated because funders of social interventions are looking to understand the campaign’s worth before agreeing to support any on-going development (De Silva et al., 2014). Such a dilemma was faced by People Matters (Leeds) Community Interest Company, which is an organisation providing SM initiatives targeting individuals with learning difficulties in the north of England. They had a programme with a funding stream that was about to end and needed to demonstrate its value before continuing support would be considered. The Big Lottery Fund (n.d.), who were the programme’s commissioners, advocate either a cost-benefit analysis or a social return on investment (SROI) approach when undertaking an evaluation review. People Matters requested support from the author and set the following objectives utilising the SROI framework:

- Review and evaluate the economic and social impact of the Teens-n-Twenties programme (the programme that needed re-funding).
- Produce a report that demonstrated the potential return on investment of the Teens-n-Twenties programme to support their continued funding bid.

These objectives were too big to be fully considered within this article, so the author chose to only focus on: demonstrating how the SROI process should be applied in SM. This objective also contributes to the knowledge and theory of SM by presenting a possible solution to the concerns of Balch and Sutton (2018), Crosier and McVey (2010) and Lister et al. (2008).

## **Background to People Matters**

People Matters is an organisation that applies SM principles to influence positive behaviour changes in individuals living with learning difficulties. They develop inclusive communities by bringing together people to enjoy leisure, learning and employment (People Matters, 2016). They have a number of programmes in place, but the focus of this case study was only on their Teens-n-Twenties project. It supports young people between the ages of 14 to 25 and is designed to prepare them to become more independent. The project allows these individuals to learn experientially through the medium of social activities within the community during the evenings and at weekends. The funding for the Teens-n-Twenties project was through the Big Lottery Fund, who are a non-departmental public body responsible for distributing 40 per cent of all funds raised for good causes through the UK’s National Lottery. The Big Lottery Fund had previously provided a grant of £420,238 to People Matter’s Teens-n-Twenties programme. It was a five-year deal which saw 90 individuals living with learning difficulties complete the programme. The cohort was made up of two groups of 45 participants, both running over a two and half year period. The average attendance was 90% each week, equating to four groups of ten participants. The sessions lasted for approximately two hours with participants spending an average of 30 minutes traveling to and from the events. There were four weeks in every year when the sessions did not run, this was due to site closure for annual leave. The groups were made up of participants whose disabilities were classed as mild, moderate or severe, as an example those with the severe classification were usually in a wheel chair and had limited ‘fine

motor skills'<sup>1</sup>. Those classed as severe had one facilitator for every participant, those classed with a moderate disability had one facilitator for every two participants, and for those classed with a mild disability had one facilitator for every five participants. Table 1 illustrates the cost breakdown for the programme. The direct costs were calculated to be £347,846 over the five years and the overheads, which included management, rent, insurance, etc., were valued at £72,392 (again, over five years).

**Table 1:** Direct Costs for the Tweens and Twenty programme.

| Support Ratio<br>(support staff to<br>participants)     | Breakdown of<br>Participants per<br>cohort (attendance<br>per week). | Cost per session per<br>person | Cost per session per<br>week.<br>(a x b) | Cost per session per<br>year (48 weeks) (c x<br>48) | Cost per session over<br>5 years (d x 5) |
|---|--|--------------------------------|--|---|--|
|   | a  | b                              | c  | d   |  |
| 1:5   | 35   | 32.08                          | 1122.80                                  | 53,894.40   | 269,472.00                               |
| 1:2   | 5  | 40.51                          | 202.55                                   | 9,722.40  | 48,612.00                                |
| 1:1   | 5  | 57.01                          | 285.05                                   | 13,682.40   | 68,412.00                                |
| <b>Total</b>  |  |                                |  | 77,299.20   | 386,496.00                               |
| <b>Ave attendance rate = 90%, thus actual costs are</b> |  |                                |  | 69,569.28   | 347,846.40                               |
| <b>Overheads</b>  |  |                                |  | 14,478.32   | 72,391.60                                |
| <b>Total Grant from the Bog Lottery Fund</b>            |  |                                |  |   | <b>420,238.00</b>                        |

*Source.* People Matters (Leeds) CIC.

### SROI and the Theory of Change

SROI can be defined as a framework for evaluating the concept of value, “it seeks to reduce inequality and environmental degradation and improve wellbeing by incorporating social, environmental and economic costs and benefits” (Nicholls, Lawlor, Neitzert, & Goodspeed, 2012, p.8). Nicholls et al. (2012) go on to say that the concept of value goes beyond a financial number, it should be considered as an entity which is created or destroyed through our actions. Such a premise makes it ideal for SM as it can potentially provide the foundations to French and Russell-Bennett’s (2015) first criteria of their hierarchical model of SM (i.e., the principal element, which is the creation of value). This hierarchical model was also used to confirm that the Teens-n-Twenties project was a valid SM intervention, although an analysis of the details goes beyond the scope of this article.

It could be argued that the SROI concept is of great importance to SM because much of the current literature does not consider cost and value, this premise is supported by Evans-Lacko, Henderson, Thornicroft, and McCrone, (2013), although their focus was limited to SM and mental health. A review of Stead and McDermott’s (2011) reasons for evaluating SM

<sup>1</sup> Fine motor skills refer to the movements a child makes when using the small muscles in their hands and forearms (Kelly, 2017).

campaigns, identified that value was not explicitly included. They did, however, recognise that measuring a campaign's cost effectiveness was important but provided no indication on how this should be done. SM evaluation studies tend to focus on appraising the final behaviour change (see, Coulon et al., 2012; Foerster et al. 1998; Redmond & Griffith, 2006; Schellenberg et al., 1999). McHugh and Domegan (2017, p.135) provide a different perspective, they focused on "what worked well" (if at all) then evaluated "how and why success or indeed failure happened." This was an adaption of Gordon and Gurrieri's (2014) work on reflexive process evaluation. All these types of evaluations provide useful insights, but as identified earlier, they fail to consider the cost of a programme and its related savings (see Crosier & McVey, 2010).

Central to the SROI framework is the Impact Map which analyses how the inputs or resources deliver the required outcomes (Nicholls et al., 2012). The "relationship between inputs, outputs and outcomes is called a 'theory of change' or a logic model" (Nicholls et al., 2012, p.29). The theory of change (TOC) can be traced back to the 1930s (De Silva et al., 2014) but as with most academic terms, there is no agreed definition (Vogel, 2012). The concept is confused further by the use of different expressions to describe it. Blamey and Mackenzie (2007) identified that the TOC is often misaligned with Pawson and Tilley's (1997) realistic evaluation, despite there being clear distinctions between the two. Weiss (1995) described the TOC as an amalgamation of programme and implementation theory. Programme theory can be considered as the "sets of ideas and assumptions, which professionals and practitioners use in the planning and execution of interventions" (Manzano & Pawson, 2014, p.367), whereas implementation theory is "the production of a robust set of conceptual tools that enable researchers and practitioners to identify, describe and explain important elements of implementation processes and their outcomes" (May, 2013, p.2). Blamey and Mackenzie (2007) suggest that those seeking to adopt a TOC approach should lean towards the implementation theory whereas those who prefer the realistic evaluation option should focus on programme theory. This proposition is based on the belief that the realistic evaluation option is one that becomes generalizable (Blamey & Mackenzie, 2007; Connell & Kubisch, 1998; Pawson & Tilley 1997). One could contend that the need to generalise is not always a key requirement, particularly if the evaluation is being done for a specific organisation, this is because they would only be interested in their own results. The author has chosen to use the TOC as the theoretical lens for the study, but the differences highlighted above may cause confusion. For clarification, it is the Weiss' (1995) option (i.e., the TOC being an amalgamation of programme and implementation theory) that is considered. The author selected this as the preferred definition because programme and implementation theory have close synergies to the six-stage process provided by the Center for Theory of Change (2007). This makes the SROI ideal for SM practitioners and scholars because of its detail framework, which is also supported by accepted theoretical models.

Returning to the details of the SROI process, Yates and Marra (2017) describe the overall SROI impact as a ratio, i.e., 8:1 which means, £8 worth of social good is created for every £1 invested. They require researchers to consider the dead-weight measures, which establishes "the amount of outcome that would have happened even if the activity had not taken place" (Nichols et al., 2012, p.55) and attribution measures, which "is an assessment of how much of the outcome was caused by the contribution of other organisations or people" (Nichols et al., 2012, p.59). The dead-weight and attribution measures are presented as a percentage and the whole process must involve stakeholders; understand what changes, value only the things that matter; only include what is material; not be over-claimed; be transparent; and have the results verified (Moody, Littlepage, & Paydar, 2015). Not everyone agrees that the SROI model is ideal,

Pathak and Dattani (2014) believe it has three issues. The first relates to the determining of the dead-weight measurement. They contend that the dead-weight is based on values from other studies and has no basis of generalisation. Arguably, this anchoring bias (i.e., the use of external information to form a view) can be overcome if researchers can demonstrate that the chosen dead-weights are applicable to their study. Utilising an action research approach (see Reason & Bradbury, 2001) where approval is gained from the team managing the programme in question could be the means of confirming this applicability. Pathak and Dattani (2014) were equally critical about the way the attribution is calculated. Moody, Littlepage and Paydar (2015) agree, although they argue that no study will be able to provide an accurate calculation of an attribution, although they recommend researchers consider the opinions of all stakeholders to mitigate this concern.

Pathak and Dattani's (2014) second concern was associated with the absence of discount rates in the calculation. Such a stance is justified only if the objective is to calculate future SROI values, because historical reviews can use actual figures. Notwithstanding the concerns, these discount rates do not fully address the issue, as scholars like Furrer (2016), Myers (1984), and, Olsson and Levin (2015) have all highlighted the problems with this process. Pathak and Dattani's (2014) final concern was about the allocations of overheads. It is a topic which has also been greatly debated (see Goddard & Ooi, 1998; Abdel-Kader & Luther, 2006; Pickering & Byrnes, 2016). These debates go beyond the scope of this study, as such only Pickering and Byrnes' (2016) view will be considered, they believe that the adoption of an overhead model should be strategic. In this case the funding bodies would make an assessment during their evaluation and decide if the proposal is acceptable.

## Method

This study adopted Nicholls et al.'s (2012) SROI framework (see table 2) as its primary methodological approach. Embedded within it was a qualitative process utilising semi-structured interviewing, action research and surveys, which were analysed using thematic analysis (see Braun & Clarke, 2006) on QSR International's NVivo for Mac (Version 11) platform.

**Table 2:** The SROI Framework (adapted from Nicholls et al. (2012)).

| Stage | Description                 |
|-------|-----------------------------|
| 1     | Establishing the scope.     |
| 2     | Map outcomes.               |
| 3     | Develop outcome indicators. |
| 4     | Establish impact.           |
| 5     | Calculate SROI              |
| 6     | Report to stakeholders      |

The scope of the project was established through a directive from the CEO of People Matters. Interviews with the People Matters' executive team allowed the author to challenge and/or question the logic for any restrictions or requirements. A key limitation was the project timing because it only had a twelve-week completion target (which was linked to the submission deadline from the BIG Lottery Fund).

Nine stakeholder groups were identified, a summary of their profiles is illustrated in table 3. The study had 16 face-to-face interviews with participants plus parents / carers and 15 open-ended surveys (equating to 69% of the second cohort). Due to the timing restrictions, a decision was made not to interview stakeholders from the funding bodies, the other service providers or

the Leeds Youth Offending Service (this particular group would have required additional ethical approval). The restrictions limited the opportunity of gaining a rich insight from a different perspective, but the board felt it was a worthy risk.

**Table 3:** Stakeholder Profile.

| Stakeholder Group  | Study Participation   |
|--|-----------------------|
| Delivery organisation (People Matters)                             | 2 (CEO and Board)     |
| Delivery organisation's staff                                      | 4                     |
| Participants (Under 18-years)                                      | 14                    |
| Participants (Over 18-years)                                       | 2 (plus their carers) |
| Participant's parents or guardians (face-to-face) <sup>1</sup>     | 14                    |
| Participant's parents or guardians (survey) <sup>1</sup>           | 15                    |
| Funding bodies (Big Lottery and Leeds County Council) <sup>2</sup> | Not interviewed       |
| Other service providers <sup>2</sup>                               | Not interviewed       |
| Leeds Youth Offending Service <sup>3</sup>                         | Not interviewed       |

Source. Author.

<sup>1</sup> The sample frame was taken from the second cohort and was made up of 81 people (9 single parents/carers and 36 couples).

<sup>2</sup> Due to time limitations this group was not interviewed.

<sup>3</sup> Due to ethical and time limitations this group was not interviewed.

Stage two was the mapping of the outcomes. It began with the identification of inputs, i.e., what the organisation provided to facilitate the programme, including costs. A semi-structured interviewing process with the staff who delivered the programme was used. The valuing of these inputs was established using a cost-based analysis approach (see Kaplan & Copper, 1998). All the cost data was provided by the organisation's finance team. The outputs, which were the benefits and/or added value activities of the programme, were initially taken from the Teens-n-Twenties marketing material. The data was confirmed then expanded through semi-structured interviews, using the staff that delivered the programme, parents / carers of those who participated and the participants themselves. Special ethical approval was needed because these participants were classed as vulnerable young individuals. The interviews took place at the premises of People Matters with the parent(s) or carer(s) present. To maximise the reach, a survey consisting of open-ended questions based on the same semi-structured questions was sent only to the parents and carers who were unable to attend the face-to-face interviews (note the survey was sent after all interviews were completed so that a definitive list of questions could be considered). All the results were analysed using a thematic analysis approach.

There were two types of outputs, direct and indirect. The direct outputs were the primary programme objectives, as indicated in its marketing material plus any other additional elements identified through the semi-structured interviews that had a direct impact on the participant. The indirect outputs were those elements that either had no direct bearing on the participants, could be achieved without the participants or were a consequence of not engaging in the programme (this will become clearer in the results section). Each direct output was valued as a weighted proportion of the total costs of the inputs, see Equation (1).

$$(1) \quad \text{Total Value of Outputs (TVO)} = X_1 \text{Output}_1 + X_2 \text{Output}_2 + \dots + X_n \text{Output}_n$$

Where  $X_1 + X_2 + \dots + X_n = 100\%$

The weighting for these outputs were identified through discussions during a focus group (action research), consisting of members of the finance and delivery teams. The overheads were not considered in the calculation (this was a specific request by the board as they did not want

the results to look over inflated and is in line with Pickering and Byrnes' (2016) view on overheads, which was discussed earlier). The indirect outputs were costed using the Social Value UK's (2018) Global Value Exchange database (which is an open-source database of values, outcomes, indicators and stakeholders for social research). It should be noted that there were a range of options to select from, so the decision was made to filter the options using time, appropriateness and geography factors (i.e., only recent UK options, which had close synergies were considered).

All the values were presented to the team at People Matters and a focus group of four parents and carers for sign-off. Possible dead-weights and attribution factors were also identified during this process. Each element was then given a new proxy valuation (PV), where final Total Value of Outputs (TVO) were depleted by the dead-weights (DW) and attribution percentages (A), see Equation (2):

$$(2) \quad PV = (TVO (100\%-DW) (100\%-A))$$

These were totalled then divided by the original investment from the UK's Big Lottery Fund, see Equation (3):

$$(3) \quad SROI = \frac{PV_1 + PV_2 + PV_3 + \dots + PV_n}{Programme Investment}$$

A sensitivity analysis, based on the best and worst cases of the dead-weights and attributions, was completed, giving two extremes of the SROI for the evaluators to review. The whole process was then written up as a formal report, allowing People Matters to submit it as supplementary evidence in their new funding bid to the Big Lottery Fund. To help the reader better understand this, a process flow diagram has been included of the calculation process, see figure 1.

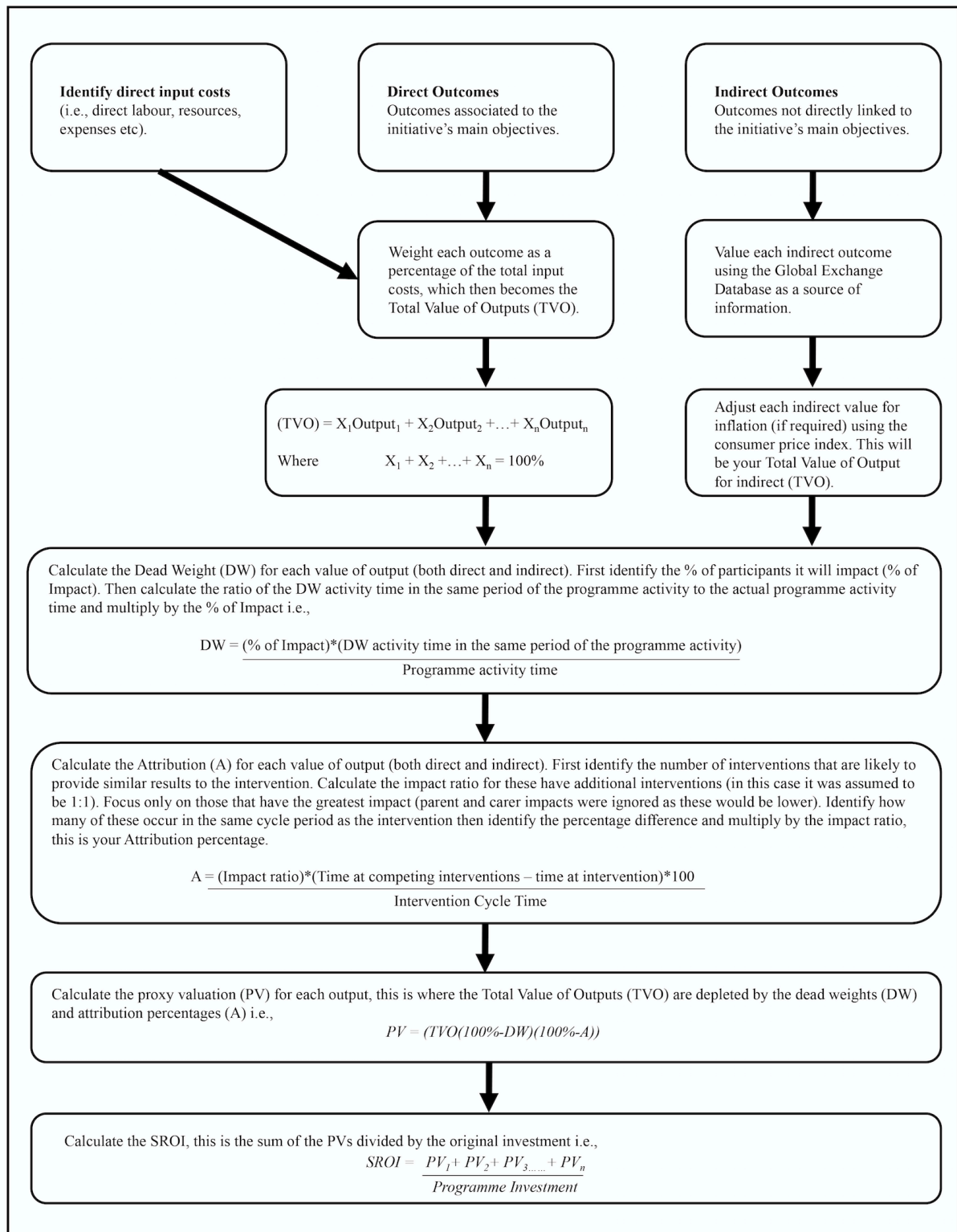
## Results.

### *The Delivery Organisation and Staff.*

The Teens-n-Twenties programme was promoted as having four key objectives: develop the skills needed to spend money and purchase basic items; use public transport; become independent (i.e., preparing them for adulthood); and adopt safe behaviours in public places. The staff that facilitated the programme confirmed these four factors as the primary objectives, but during the interviews, the following themes were also identified:

1. Increased personal hygiene and appearance: there was a need for participants to understand the importance of maintaining an acceptable level of personal hygiene and an appropriate appearance. An example quote:  
*"We teach the candidates the importance of managing their looks. This could be the one obstacle that restricts them from being fully accepted in society. Also, understanding when to have a coat or waterproof is a key message we instil"*  
(Facilitator 3).





**Figure 1: A process flow for the calculation process.**

2. Reduction in challenging behaviours: the management of aggression and/or inappropriate behaviours (including sexual) was a key trait for participants to develop. An example quote:

*“Sadly, we live within a society that has individuals who take pleasure in exploiting vulnerable individuals. We try to teach the group how to protect themselves and show them what they should and shouldn’t do” (Facilitator 2).*

The second theme was closely linked to the ‘safe behaviour in a public place’ objective. The facilitators wanted to include it as an additional output because they felt it was at the other extreme and worthy of being highlighted.

### *Participants.*

Careful consideration was given to the questioning of the participants. The board felt it was important that they had a voice in the process. The semi-structured interviews were designed to confirm the outputs identified by the facilitators. In most cases (n=13) the participants were able to corroborate these findings, those that could not (n=3) were identified as being newer members to the programme. In all cases, the parents and carers confirmed that there were positive changes to the participant’s ability to undertake the activities highlighted by the facilitators. Three additional themes were identified, although strictly speaking these themes were identified through discussions with the parents and carers:

1. Attending similar groups: all participants confirmed that they were involved with at least one other group designed for individuals living with learning difficulties. These groups were classed as an attribution factor, it occurred only in the evenings during the week (although, there were occasions when weekend activities took place, but these were rare). An example quote:

*“I like People Matters, I have many friends here, we also go to XXX [name of programme provided by a similar organisation]... We go every night (corrected by parent, who then explained that the organisation was similar to People Matters), I go on Wednesday and Thursday” (Participant 2).*

Some participants (n= 4) were involved with these different organisations five nights a week. This meant that the worst-case attribution was 80% (i.e., four of the five nights were spent on a different programme which could be attributing to the desired behaviour changes). The majority of the participants (n=12) were out for only three nights a week. This meant that the likely attribution was 67% (i.e., two of the three nights were spent on a different programme). Note, the ability of parents and carers to influence the desired behaviour changes was considered, but they were classed as dead-weights and will be reviewed later.

2. Volunteering: many of the participants (n=11) were volunteering to support new members on different evenings. One even became a non-executive director at People Matters. Discussions with the parents, carers and supporting staff confirmed the importance of this role (volunteering) in preparing individuals for future employment. As volunteering was a requirement in the delivery process, the theme was considered to be an indirect output (i.e., People Matters could have limited the volunteering to non-participating individuals). An example quote:

*“Yes, I am director, I am director at People Matters (carer confirms that this is a non-executive role), I have a job as well, I do cleaning down stairs with erm... with erm... (carer helps with the name of the company and what the job entails). It’s a good job ...” (Participant 11).*

3. Meeting friends: friendships or social networking was identified to be important to all participants (n=16), they also confirmed it as their main reason for attending. An example quote:

*“I come to People Matters to see my friends (parent explains that this is where her main friendship group is, she struggled in the past particularly at school)” (Participant 4).*

Fujiwara, Oroyemi and McKinnon (2013) and Powdthavee (2008) costed this factor and described it as ‘not being able to meet up with friends a number of times per week’. It was seen as a negative element (i.e., a consequence of there being no Teens-n-Twenties programme) and was classified as an indirect output.

From a methodological perspective, identifying new insights from the participants (those with the learning disability) was challenging. The author was conscious that these individuals may have been slightly anxious of the process. This was identified through their body language, in all cases the participants glanced at their parent / carer whilst answering in what appeared to be an attempt to seek approval. The author suggests adopting an ethnographic approach for any scholars seeking to identify more information from these types of participants.

#### *Parents and Carers.*

The results of the semi-structured interview and open-ended survey questions were combined, and the following themes identified.

1. Time to do other things: All the parents and carers who answered the survey or attended the interview saw the programme as a respite break, giving them the opportunity to spend quality time with their other children, their spouse or just visit friends. An example quote:  
*“We love XXX [name of child on the programme] dearly, but I know he gets most of our attention. When he goes to People Matters we go out with YYY, my other son, it’s an opportunity to give him the attention he needs” (Parent 6).*
2. Reduction in stress and anxiety: some of the parents (n=5) expressed feelings of stress and anxiety, two had stated that they had been depressed. These responses were identified from the written survey, as such, the study was unable to test if the depression was a direct result of their child having learning difficulties. An example quote:  
*“There was a time when this was all too much for me, I felt depressed and helpless. Now I can see some hope” (Parent 17).*
3. Not being able to meet up with friends: this was similar to that experienced by the participants. The majority (n=21) stated that it was a problem before the child had started at People Matters. The theme was linked to ‘time to do other things’ but was segregated as a separate option because scholars like Fujiwara, Oroyemi and McKinnon (2013) and Powdthavee (2008) see it as a key component in their life satisfaction survey.

#### *Proxy valuations.*

Having identified the inputs and outputs of the programme, the SROI framework required researchers to calculate the total value output (TVO) for each element, then identify the dead-weights and attributions so that the final proxy valuation (PV) could be established (see Equation (2)). Before doing this the direct outputs needed confirming (see Equation (1)). The action research focus group opted to apply equal values to the original outputs, then half the value for the two new elements (see table 4). The dead-weights for these elements were set at 20%, and were based on a study by Lader, Short and Gershuny (2006) which looked at the time

parents would directly spend with their children. They identified that, on average, this would be 24 minutes a day, which equated to 20% of the 2-hour Teens-n-Twenties session (i.e., 24 mins / 120 mins, the length of the session). It is unlikely that they would devote all this time to educating the child and because the contact time over the weekend was not considered, the full 20% was used in the dead-weight calculation. This helped maintain a pragmatic approach to the process, more importantly the logic was included in the final report. As with the previous outputs, the attribution was set between 66 and 80 percent.

**Table 4:** Values of Outcomes as a proportion of direct costs.

| Output                              | % Breakdown | Cost per output over 5 years. |
|-------------------------------------|-------------|-------------------------------|
| Ability to Travel                   | 0.20        | 69,569                        |
| Ability to use money.               | 0.20        | 69,569                        |
| Become more independent             | 0.20        | 69,569                        |
| Safe behaviours in public           | 0.20        | 69,569                        |
| Personal Hygiene and appearance     | 0.10        | 34,785                        |
| Reduction in Challenging behaviours | 0.10        | 34,785                        |
|                                     |             | 347,846                       |

Source. People Matters (Leeds) CIC.

The factors of volunteering and not meeting with friends were not included among the programme costs because they were considered to be indirect consequences of the programme.

#### *Volunteering.*

The proxy valuation for the participant's ability to volunteer was identified through the Global Exchange database and was based on the study by Fujiwara, Oroyemi and McKinnon (2013). This evaluation was derived from four datasets developed during the years 2000, 2002, 2004 and 2008. It originated from the life satisfaction and volunteering status in the British Household Panel Survey (see University of Essex. Institute for Social and Economic Research, 2010). They estimated the value that frequent volunteers placed on volunteering to be £13,500 per annum at 2011 prices. This was then adjusted for inflation and was calculated to be £13,566 (the calculation was based on the changes in the consumer price index from 2011 to 2015, and the figures were sourced from the UK's Office for National Statistics (see Gooding, 2017)). Records from People Matters identified that 22 participants took part in volunteering opportunities, making the final output cost for the participant's ability to volunteer to be £1,492,205 (i.e., 13,566 x 22 participants x 5 years). The dead-weight was zero because if there was no Teens-n-Twenties there would be no Teens-n-Twenties volunteering (note, the volunteering was unique to People Matters). As with the previous outputs, the attribution was set between 66 and 80 percent.

#### *Not being able to meet up with friends.*

The proxy valuation for the participant's ability to meet up with friends was also calculated using Fujiwara, Oroyemi and McKinnon's (2013) study. Using the same principles identified earlier, the average value, during the 5-year evaluation period equated to £18,053. This made the final output cost for not being able to meet up with friends to be £3,655,733 (i.e., 18,053 x

45 participants x 90% average attendance rate x 5 years). The dead-weight measure equated to eighty-one percent because twenty-five of the thirty-one parents and carers said that they had taken the participants to visit friends (or had friends come to visit) before joining the programme and that they would have continued to do this had they not joined People Matters (i.e., 25/31). Of those who did not take the child on social visits, sixteen percent (n=5) said, heavy work commitments meant that the individual was left to entertain themselves. A further three percent (n=1) said that the child physically did not want to go out and socialise because of a memory of a bad experience. This theme demonstrated the importance of the programme because those who were not interacting with friends previously now saw the programme as an easy way to engage with like-minded individuals. A similar value was given to the parents and carers, they were made up of three single male parent/carers, six single female parent/carers and thirty-six couples, making a total cohort of eighty-one individuals. The proxy valuation for not being able to meet up with friends for parent/carers was calculated to be £6,580,319 (i.e., 18,053 x 81 individuals x 90% average attendance rate x 5 years). Twenty-eight couples (or fifty-six individuals) stated that they managed to find time to keep up with other friends even when their child was not involved in the programme, so the dead-weight was calculated to be 69% (i.e., 56/81). The attribution remained within the 66 to 80 percent range.

#### *Caring and stress counselling costs.*

The cost of care was obtained from the 2009 Annual Survey of Hours and Earnings, which had the median gross weekly pay rates for all employees in the United Kingdom (see Curtis, 2012). Taking into account inflation (using the same principles exemplified in the volunteering section), the average hourly rate for a carer was estimated to be £8.85. The cost of caring was calculated to be £258,066 (based on 3 hours (which was the time spent at People Matters including travel) x £8.85 x 45 participants at 90% attendance rate, for 48 weeks over 5 years). The dead-weight was set at 69%, using the same argument for not being able to meet up with friends (i.e., this was the percentage where a partner would be on hand to cover the caring), but no attribution value was presented as the costs were based on the actual attendance.

Clarke and Beck (1999) identified that the prevalence rates for diagnosable depressive disorders for parents of children with intellectual disabilities ranged from 2.6% to 12.7% in men, and 7% to 21% in women. McCrone, Dhanasiri, Patel, Knapp, and Lawton-Smith (2008) calculated that the average annual cost for treating these individuals in the UK was £2085 (at 2007 rates). Adjusting for inflation the average cost between 2011 and 2015 increased to £2314 (using the same principles exemplified in the volunteering section). People Matters stated that approximate 11% of the parents (only for the second cohort, figures for the first cohort were not available), and carers (n=9) were single with a 6:3 ratio of females to males. Taking the mean ranges of the prevalence's identified, one would expect eight individuals within the cohort to be living with diagnosable depressive disorders. Although the questioning and surveys did not specifically ask if any parents or carers were suffering with such a disorder, five respondents from the written survey stated that they felt depressed about the situation. This factor cannot be directly correlated to the condition without further examination, but for reasons of prudence and to demonstrate it as a social value, the figure of 5 was used as the final valuation of the stress counselling element, which equated to £57,850 (i.e., 5 individuals x £2314 x 5 years). The dead-weight was left at zero, because detail questioning about participant's mental health would be required to ascertain the value which would have meant resubmitting an ethics approval request then revisiting parent / carer participants. The attribution remained within the 66 to 80 percent range.

A summary of the final calculations are presented in tables 5 and 6. They illustrate the best and worst case of the potential SROI, which was 2.36 and 3.88 to 1 (i.e., for every £ invested, a value of between £2.36 and £3.88 were delivered in social worth).

**Table 5:** Worse case SROI summary.

| Factor Description   | Breakdown per programme % | Programme Value £ | Dead-weight (DW) % | Programme Value Less DW £ | Attribution (A) % | Programme Value less DW & A £ |
|--|---------------------------|-------------------|--------------------|---------------------------|-------------------|-------------------------------|
| <b>Programme Costs</b>   |                           |                   |                    |                           |                   |                               |
| Ability to Travel  | 20%                       | 69,569            | 20%                | 55,655                    | 80%               | 11,131                        |
| Ability to use money   | 20%                       | 69,569            | 20%                | 55,655                    | 80%               | 11,131                        |
| Become more independent  | 20%                       | 69,569            | 20%                | 55,655                    | 80%               | 11,131                        |
| Safe behaviours in public  | 20%                       | 69,569            | 20%                | 55,655                    | 80%               | 11,131                        |
| Personal Hygiene and appearance                                    | 10%                       | 34,785            | 20%                | 27,828                    | 80%               | 5,566                         |
| Reduction in Challenging behaviours                                | 10%                       | 34,785            | 20%                | 27,828                    | 80%               | 5,566                         |
| <b>Sub total</b>   |                           | <b>347,846</b>    |                    | <b>278,277</b>            |                   | <b>55,655</b>                 |
| <b>Participants Costs</b>  |                           |                   |                    |                           |                   |                               |
| Participants value for volunteering.                               |                           | 1,492,205         | 0%                 | 1,492,205                 | 80%               | 298,441                       |
| Not being able to meet up with friends a number of times per week. |                           | 3,655,733         | 81%                | 694,589                   | 80%               | 138,918                       |
| <b>Sub total</b>   |                           | <b>5,147,938</b>  |                    | <b>2,186,794</b>          |                   | <b>437,359</b>                |
| <b>Respite Cost</b>  |                           |                   |                    |                           |                   |                               |
| Caring cost  |                           | 258,066           | 69%                | 80,000                    | 0.00              | 80,000                        |
| Not being able to meet up with friends a number of times per week. |                           | 6,580,319         | 69%                | 2,039,899                 | 80%               | 407,980                       |
| <b>Sub total</b>   |                           | <b>6,838,385</b>  |                    | <b>2,119,899</b>          |                   | <b>487,980</b>                |
| <b>Parent / Carer Healthcare Costs</b>                             |                           |                   |                    |                           |                   |                               |
| Stress Counselling   |                           | 57,850            | 0%                 | 57,850                    | 80%               | 11,570                        |
| <b>Sub total</b>   |                           | <b>57,850</b>     |                    | <b>57,850</b>             |                   | <b>11,570</b>                 |
| <b>Total Social Impact (TSI)</b>                                   |                           |                   |                    |                           |                   | <b>992,565</b>                |
| <b>Programme Investment (PI)</b>                                   |                           |                   |                    |                           |                   | <b>420,238</b>                |
| <b>SROI (TSI/PI)</b>   |                           |                   |                    |                           |                   | <b>2.36</b>                   |

Source. Author.

**Table 6:** Best case SROI summary.

| Factor Description   | Breakdown per programme | Programme Value  | Dead-weight (DW) | Programme Value Less DW | Attribution (A) | Programme Value less DW & A |
|--|-------------------------|------------------|------------------|-------------------------|-----------------|-----------------------------|
|  | %                       | £                | %                | £                       | %               | £                           |
| <b>Programme Costs</b>   |                         |                  |                  |                         |                 |                             |
| Ability to Travel  | 20%                     | 69,569           | 20%              | 55,655                  | 66%             | 18,923                      |
| Ability to use money   | 20%                     | 69,569           | 20%              | 55,655                  | 66%             | 18,923                      |
| Become more independent  | 20%                     | 69,569           | 20%              | 55,655                  | 66%             | 18,923                      |
| Safe behaviours in public  | 20%                     | 69,569           | 20%              | 55,655                  | 66%             | 18,923                      |
| Personal Hygiene and appearance                                    | 10%                     | 34,785           | 20%              | 27,828                  | 66%             | 9,461                       |
| Reduction in Challenging behaviours                                | 10%                     | 34,785           | 20%              | 27,828                  | 66%             | 9,461                       |
| <b>Sub total</b>   |                         | <b>347,846</b>   |                  | <b>278,277</b>          |                 | <b>94,614</b>               |
| <b>Participants Costs</b>  |                         |                  |                  |                         |                 |                             |
| Participants value for volunteering.                               |                         | 1,492,205        | 0%               | 1,492,205               | 66%             | 507,350                     |
| Not being able to meet up with friends a number of times per week. |                         | 3,655,733        | 81%              | 694,589                 | 66%             | 236,160                     |
| <b>Sub total</b>   |                         | <b>5,147,938</b> |                  | <b>2,186,794</b>        |                 | <b>743,510</b>              |
| <b>Respite Cost</b>  |                         |                  |                  |                         |                 |                             |
| Caring cost  |                         | 258,066          | 69%              | 80,000                  | 0.00            | 80,000                      |
| Not being able to meet up with friends a number of times per week. |                         | 6,580,319        | 69%              | 2,039,899               | 66%             | 693,566                     |
| <b>Sub total</b>   |                         | <b>6,838,385</b> |                  | <b>2,119,899</b>        |                 | <b>773,566</b>              |
| <b>Parent / Carer Healthcare Costs</b>                             |                         |                  |                  |                         |                 |                             |
| Stress Counselling   |                         | 57,850           | 0%               | 57,850                  | 66%             | 19,669                      |
| <b>Sub total</b>   |                         | <b>57,850</b>    |                  | <b>57,850</b>           |                 | <b>19,669</b>               |
| <b>Total Social Impact (TSI)</b>                                   |                         |                  |                  |                         |                 | <b>1,631,359</b>            |
| <b>Programme Investment (PI)</b>                                   |                         |                  |                  |                         |                 | <b>420,238</b>              |
| <b>SROI (TSI/PI)</b>   |                         |                  |                  |                         |                 | <b>3.88</b>                 |

Source. Author.

## Discussion.

The methodological approach adopted by this study demonstrated that an economic value can easily be attributed to an SM campaign. However, as discussed, it should not be considered in isolation. The provision of a monetary figure together with the richness of information gleaned from the participants can demonstrate where the social value (i.e., how society perceives the outcome of the intervention) originates from within an SM campaign; a premise which is supported by Arvidson, Battye and Salisbury (2014). This link between economic return and social value makes it an ideal way to communicate the benefits of the campaign (see also Maier, Schober, Simsa & Millner, 2015). That said, the valuing of each output will undoubtedly be

the most contentious part of the SROI process. Fujiwara, Oroyemi and McKinnon (2013) believe that all individuals consider a number of costs frames when contemplating the procurement or use of any goods or services. The most important being a 'willingness to pay', which could be financial and/or some other form of exchange. There are numerous models that can be used to evaluate these cost frames. Fujiwara and Campbell (2011) recommend the life satisfaction approach, which is an empirical approximation of a subject's well-being associated with the said goods or services (Frey, Luechinger & Stutzer, 2010). The author found such an approach complex and time-consuming. This finding is also supported by Fujiwara and Campbell (2011), who stressed that adopting a life satisfaction approach would require the development of new scales, which could be costly. The justification for using a life satisfaction approach is questionable because those organisations that are best suited for the application of an SROI review are more likely to be the ones that have limited budgets and resources. An answer to this dilemma would probably only be found when funding bodies are questioned. As of yet, the BIG Lottery Fund has not stipulated that such a detail SROI approach is required.

The final evaluation report concluded that the parent and carer's contribution to the behaviour change programme was limited only to a dead-weight factor and was set at 20% (or 24 minutes per day). On reflection, it was considered that this may not always be the case, because the parent(s) and/or carer(s) could also support their child's development by reinforcing the lessons learnt from the Teens-n-Twenties programme. It is accepted however, that each parent would, in reality, spend a different amount of time on such an activity, so the actual impact remains unclear. It is proposed that a follow-up study should be instigated to review the err. Despite this omission, the transparency of the process could have conceivably compensated for such a shortcoming, although it assumes the funding bodies have the skills to critically assess the reviews. It also demonstrates that the SROI process is not an exact science, and the results cannot be generalised because the data for each proxy value is driven from the themes identified through the semi-structured interviews. What is important is the inclusion of an action research process because involving the stakeholders should ensure acceptance of the final figure. As such, the SROI value should never be used as the sole indicator of social performance (see Olsen and Lingane, 2003). Funders need to be subjective in their decision-making process (Maier et al., 2015). They should not benchmark SROI results because higher values do not necessarily mean better campaigns.

In sum, social marketers that are considering using an SROI approach can either adopt a life satisfaction approach (see Fujiwara & Campbell, 2011) when valuing outcomes or be more pragmatic and utilise the findings from existing studies. The need to include every element that potentially influences change is not required, but they must be transparent as to the reasons why. Finally, involve the stakeholders allowing them to challenge the findings.

### **Limitations and Strengths.**

Much of the data identified was through a self-reporting process, the limitations and biases associated with such a method have been widely debated across many disciplines (see Barker, Pistrang & Elliott, 2016 for an example). The Big Lottery Fund had not set any specific targets on measuring outcomes. For People Matters, it was the presentation of the parents' and carers' perceptions that was paramount. The author believes this to be an eloquent solution to the problem, as setting targets test every individual on their level of 'objective achievement' would be very difficult and time consuming.

From an SM perspective, Gordon, McDermott, Stead, and Angus (2006) argue that more evidence is required to demonstrate that SM programmes are the main drivers of change. The



SROI framework mitigates this concern by considering dead-weights and attribution factors, with the final results presented as a lower and upper range. This has to be the main strength of the SROI process, which also helps with the research credibility. Noble and Smith (2015, p.35) believe that research credibility is made up of ‘truth value’ and ‘consistency’. As per their guidance, the truth value element can be confirmed by “participants [being] invited to comment on [and accept] the final research findings” and the consistency element can be demonstrated by a “transparent and clear description of the research process from the initial outline, through to the development of the methods and reporting of findings.” Both of which, the author believes has been demonstrated.

Another limitation relates to constraints instigated as a result of the timing restrictions; i.e., which stakeholders to interview and how to calculate the TVOs. This criticism is not a direct flaw of the SROI process, but a consequence of operationalising it. What the study does show is, a pragmatic approach can be acceptable, particularly when the process is made transparent. The author believes this to be the study’s primary strength.

### **Conclusion.**

This study calculated the SROI value for the Teens-n-Twenties programme to be between 2.36:1 and 3.88:1. People Matters were pleased that the process demonstrated a positive outcome even though three stakeholder groups were excluded. The final report was presented to the Big Lottery Fund as part of a refunding submission which resulted in People Matters receiving a renewed grant of just under £500K (People Matters, 2015), ensuring its survival and the on-going delivery of the said programme. It is unclear to what extent the evaluation played in this decision so further research to investigate how funding evaluators perceive such reports would be beneficial. The need to articulate the exact degree of behaviour change resulting from this SM programme was not needed. As demonstrated, it may be impossible to do so because of the various attribution factors that influence change. Both provider and funder have accepted this, believing that the perception of change to be the paramount factor (i.e., the views of the parents and carers). These findings demonstrate that the SROI process is not an exact science and that the inputs would always be unique to the organisation under investigation, as such, it should not be generalised. Overall, the key to success is to be transparent and acknowledge the issues which the evaluator can assess. Finally, it is the author’s belief that this work contributes to the knowledge and theory of SM by presenting a possible solution to Balch and Sutton (2018), Crosier and McVey (2010) and Lister et al. (2008) concerns.

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